Cognos® 8 Business Intelligence

COGNOS 8 GO! OFFICE

USER GUIDE

COGNOS®

THE NEXT LEVEL OF PERFORMANCE™

Product Information

This document applies to Cognos® 8 Go! Office Version 8.3 and may also apply to subsequent releases. To check for newer versions of this document, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

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Introduction

This document is intended for use with Cognos 8 Go! Office. Cognos 8 Go! Office is an add-in for retrieving content from Cognos reporting products, such as Cognos 8 and PowerPlay Web, within Microsoft Office.

This document contains overview and step-by-step information for using Cognos 8 Go! Office. It provides detailed information about using Cognos 8 Go! Office inside Microsoft Excel, Microsoft PowerPoint, and Microsoft Word.

Audience

This guide assumes that you are familiar with Cognos products, such as Cognos 8, Cognos Connection, PowerPlay, and Microsoft Office applications such as Microsoft Excel, Microsoft Word, and Microsoft PowerPoint.

Related Documentation

Our documentation includes user guides, getting started guides, new features guides, readmes, and other materials to meet the needs of our varied audience. The following documents contain related information and may be referred to in this document.

Note: A Web page such as **The page cannot be found** may appear when clicking individual links in the following table. Documents are made available for your particular installation and translation configuration. If a link is unavailable, you can access the document on the Cognos Global Customer Services Web site (http://support.cognos.com). Logon credentials are available either from your administrator or by request from support.america@cognos.com.

Document	Description
Cognos Connection User Guide	Using Cognos Connection to publish, find, manage, organize, and view Cognos content, such as scorecards, reports, analyses, and agents
Cognos 8 Administration and Security Guide	Managing servers, security, reports, and portal services; setting up Cognos samples; troubleshooting; and customizing Cognos 8
Cognos 8 Installation and Configuration Guide	Installing, upgrading, configuring, and testing Cognos 8, changing application servers, and setting up samples
Report Studio Professional Authoring User Guide	Authoring reports that analyze corporate data according to specific needs
Analysis Studio User Guide	Exploring, analyzing, and comparing dimensional data

Document	Description
Query Studio User Guide	Creating self-service business intelligence reports
Cognos PowerPlay *Enterprise Server Guide*	Administering PowerPlay servers and deploying cubes and reports to PowerPlay users in Windows environments or on the Web
Cognos PowerPlay Web *User Guide*	Viewing, exploring, formatting, and distributing PowerPlay reports using a Web browser

Finding Information

To find the most current product documentation, including all localized documentation, access the Cognos Global Customer Services Web site (http://support.cognos.com). Click the **Documentation** link to access documentation guides. Click the **Knowledge Base** link to access all documentation, technical papers, and multimedia materials.

Product documentation is available in online help from the **Help** menu or button in Cognos products. You can also download documentation in PDF format from the Cognos Global Customer Services Web site.

You can also read PDF versions of the product readme files and installation guides directly from Cognos product CDs.

Getting Help

For more information about using this product or for technical assistance, visit the Cognos Global Customer Services Web site (http://support.cognos.com). This site provides product information, services, user forums, and a knowledge base of documentation and multimedia materials. To create a case, contact a support person, or to provide feedback, click the **Contact Us** link. For information about education and training, click the **Training** link.

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Chapter 1: What's New?

This section contains a list of new features for this release. It will help you plan your upgrade and application deployment strategies and the training requirements for your users.

For information about upgrading, see the *Installation and Configuration Guide* for your product.

For information about new features for this release, see the *New Features Guide*.

To review an up-to-date list of environments supported by Cognos products, such as operating systems, patches, browsers, Web servers, directory servers, database servers, and application servers, visit the Cognos Global Customer Services Web site (http://support.cognos.com).

New Features in Version 8.3

Listed below are new features since the last release. Links to directly-related topics are included.

Improved Layout and Rendering of Report Content

The detailed Cognos 8 report definition is used to present a report in the supported Microsoft Office applications as close to the report that was originally designed in a studio, including information regarding the relative position of objects.

Support is provided for the following report objects:

- conditional blocks
- repeater blocks
- rich text items
- hyperlinks
- repeater tables

Cognos 8 Go! Office can now render more reports similarly to Cognos Viewer. For example, the following style information is supported: reading order, horizontal and vertical alignment, and preferred height and width values.

For more information, see "Additional Supported Report Objects" (p. 14)

Automatic Assignment of Names to Specific Report Elements

If no name attribute is defined for a report layout element in any of the studios, a default value is now automatically assigned when the report or query is saved to Content Manager. The value is used to uniquely identify a report element and uses the same naming convention used by Report Studio.

A default value is assigned only to the following elements:

- list
- crosstab
- repeater table
- chart elements, such as scatter, pie, polar, and combination

Default values are also assigned to these elements when they are part of a template.

For more information, see "Object Names in Report Studio" (p. 14)

Importing Stored and Burst Report Versions

You can now import saved report output versions into Microsoft Excel, Microsoft Word, and Microsoft PowerPoint. This feature is most useful to burst recipients who want to use Cognos 8 Go! Office to import content from Cognos 8 reports into Microsoft Office documents. They can then include business intelligence data in presentations or briefing books and update data in Microsoft Office. Recipients can select a version of a report previously run instead of running the report again. Previously, Cognos 8 Go! Office ran all report content on demand.

Users with execute permission can run a specified saved report output version while those with read permission are allowed to view only the report output. New properties, which can be changed, are associated with report output versions.

A new report property labeled **Enable enhanced user features in saved output versions** was added to Cognos Connection. Report authors must select this check box to allow Cognos 8 Go! Office users to import saved output versions of a report.

For more information, see "View or Run Report Output Versions" (p. 28)

Alternative Method for Setting Prompt Values

You can now use the Microsoft Office custom document properties to set prompt values. This is most useful when you want to prompt users for an initial value that is used for the same prompt in multiple reports in a Microsoft Office document.

A new prompt type named **Custom Property** was added to Cognos 8 Go! Office to indicate the user-defined custom document property. The prompt name that you specify for the **Custom Property** must match the prompt name that is entered in the Microsoft Office **Properties** dialog box (**File**, **Properties**, **Custom** tab).

For more information, see "Change Prompt Values " (p. 24)

Searching the Content Portal for Reports and Report Content

Cognos 8 Go! Office now includes two modes for searching content to find reports for import: Go! Search Service and name or description searches.

Use the Cognos Go! Search Service to perform full-text searches of content published to Cognos 8. The service examines the full content of the document, and not just the titles. Use the name or

description search to search for reports whose name, description, or both match the string entered in the search criteria.

For more information, see "Search for Reports or Report Content" (p. 33)

Chapter 2: Cognos 8 Go! Office

Cognos 8 Go! Office extends the value of Cognos business intelligence to users who prefer to work in Microsoft Office.

Use Cognos 8 Go! Office to access Cognos content in Excel where you can work with and add value to existing Cognos reports, apply calculations, and use your existing Excel macros. You can also import content into PowerPoint and Word. You can use Cognos 8 content as the basis for your presentation in PowerPoint or for briefing books using Word.

Use Cognos 8 Go! Office with any of the supported Microsoft Office applications to do the following:

- Access Cognos content by importing pre-authored reports and data (p. 13).
- Modify Cognos business intelligence content using familiar interfaces (p. 24).
- Refresh the Microsoft Office documents with updated information on demand for strategic planning, forecasting, and business reporting (p. 31).
- Publish and share Cognos-enabled files to the secure Cognos 8 portal.

  For more information, see Cognos 8 for Microsoft Office *Getting Started*.

Cognos security is maintained in your Microsoft Office environment. For example, if you share an Excel workbook with coworkers, when they connect to the Cognos 8 server to retrieve or refresh data, their security permissions are used. A logon within the Microsoft Office environment authenticates you and ensures proper administration.

Importing Report Content

You can import report content into the following Microsoft Office applications: Excel (p. 16), PowerPoint (p. 18), and Word (p. 21).

To import content from pre-authored Cognos reports, you must select the report elements that you want to work with in your Microsoft Office application.

You can import Cognos 8 elements such as crosstabs, graphs, charts, and tables. You can maintain the original report formatting and identify its source and creation date. After the content is imported, you can manipulate it with Microsoft Office features, such as Auto Filter, Charting, Formatting, and Comments. You can then refresh the content and maintain links to the contextual information.

Report elements contain pages, which are containers for the layout objects that define the appearance and formatting of a report. A page is made up of a header (optional), body (mandatory), and footer (optional). The headers and footers may include text, such as page numbers or images. The body element presents the data in a meaningful way by including report types such as lists, crosstabs, charts, maps, or repeaters. Repeaters are tables into which report authors can insert items that will be repeated. For example, repeaters may be used to repeat customer names or addresses.

Object Names in Report Studio

By using the **Name** attribute in Report Studio, report authors can label report elements using descriptive names to uniquely identify the objects. If an author does not define a name for an element, a unique default value for the **Name** property is automatically generated during the import process for the following elements:

- list
- crosstab
- repeater table
- chart elements, such as pie, scatter, and combination

When a report element has a name, it can be refreshed with the most recent data from the content server. Elements, such as text and images, that do not have defined names are not available for importing. The report author must specifically name these objects.

Multilingual Reports and Content Language

Cognos 8 users can personalize the way data appears in Cognos Connection by changing user preferences. For example, users can set the content language or product language. The content language is used to view and produce content in Cognos 8, such as name and description of entries in Cognos Connection, or data in reports. Users can specify the default language to be used when a report is run. When a language is not specified in the report properties, the language in the user preferences is used.

Microsoft Office applications, such as Excel, interpret and show the data correctly according to the user locale settings in Windows. For this reason, Cognos 8 Go! Office does not support the language associated with the user preference settings in Cognos Connection or the language specified in the report properties.

For example, if the user preferences settings in Cognos Connection specify the content locale as German, and the client computer has the regional options set to English (United States) locale, when the report is imported into Excel, Word, or PowerPoint, the content or report data is reformatted to match the English (United States) locale setting.

Additional Supported Report Objects

The following additional objects are imported when they are part of the Cognos report layout.

Object	Description
Conditional blocks	Contain items that may be rendered if the condition is met. They are used for conditional formatting, such as highlighting exceptional data in a report. Contents of conditional blocks appear in italics in the **Import Content** wizard and on the tree hierarchy on the **Manage Data** tab.

Object	Description
Repeater blocks	Used to insert items that will be repeated. Blocks are often used to lay out horizontal bands of information. In PowerPoint, items inside the repeater block are assigned the same font as all other items and may not appear as intended.
Rich text items	Used to render HTML in the layout. These can also render in PDF output. Rich text items are useful for adding annotations defined in a data source to a report.
Hyperlinks	May be added by report authors so that users can jump to another place, such as a Web site.
Repeater tables	Used to render query data in a table.

With the exception of Excel, any borders that were added to objects in the report, such as a column, a header, or a footer, are also imported. The width, style, and color of the borders are mapped to the Microsoft Office style.

Unsupported Report Objects and Formatting Properties

The following report objects or formatting properties are not imported:

- text flow, such as Kashida spacing and bidirectional text
- text properties, such as word breaks and justification styles
- padding or margin properties
- bookmarks that are used in PDF or HTML reports
- HTML items

  These items are containers in which users can insert HTML code. HTML items can be anything that your browser runs, including links, images, multimedia, tooltips, or JavaScript.
- background images, such as watermarks
- layout of objects that are embedded within a list or crosstab

  For example, reports authored in Report Studio can contain list objects embedded within list objects, with specific formatting applied. When converted to the tabular representation available in Microsoft Excel, these reports may not be rendered in the same way that they appeared in Report Studio.

Named Ranges in Excel

In Microsoft Excel, report content is imported to named ranges, which are descriptive names for groups of cells. If the report type is a crosstab, rows, columns, and measures of the report are each

assigned a named range. If the report type is a list, the combination of rows and columns is a assigned a named range.

You can use named ranges to manage content in Microsoft Office Excel. You can easily select the range when you need it for charts or pivot tables, or to jump to a specific location in your document. For example, you can move the block of cells that are in Sheet 12 to create a chart of that data in Sheet 20 by just referring to the named range. This eliminates the task of moving through the sheets to get to Sheet 12 and then highlighting the range.

Named ranges must be unique. Cognos 8 Go! Office assigns a default unique name and location to a report when it is imported. To assign a more obvious name to a report, you can change this default name as long as it is unique and follows the Excel conventions for named ranges. When typing a name for a named range, you must follow the conventions set in Excel, which forbids the use of special characters except underscore (_) and requires a letter for the starting character.

Import Cognos Report Elements into Microsoft Excel

You can import report content, including data, metadata, headers, footers, and charts, from a variety of pre-authored Cognos reports into Excel for additional work.

The query used to import and refresh data is a query for the entire report element that you select. If your data or data structure, such as the number of rows and columns, changes on a subsequent refresh, the report element resizes, but other elements in the workbook may be overwritten. For more information, see "Refresh Report Content" (p. 31).

Steps

1. In Cognos 8 Go! Office, click the **Browse Content** tab.
2. Expand the list of reports from the top node and click the report that you want to import into the workbook.
3. Click **Import Content**.

   If this report was imported into this workbook already, a unique name for this instance of the report is assigned.
4. If you want to change the default name, in the **Name** box, type a different name, using no more than 215 characters.
5. Under **Report pages**, choose from the following:
   - To insert report content in one continuous flow on the current worksheet, click **Ignore paging**.
   - To insert the report content on the current worksheet and insert page breaks, click **Insert breaks between report pages** and, in the **Location** box, type the cell location where data appears on each worksheet.
   - To copy each page of the report to a new worksheet, click **Create new worksheets for report pages** and, in the **Location** box, type the cell location where data appears on each worksheet.

6. Under **Report version**, choose whether you want to refresh or import content from a specific report output version:

   - To run a report version with the most recent content changes, click **Run the report**.

     You must have execute permission to run a report. You must have read and traverse permissions for the folder that contains the report. If you have only read permission, you can view only output versions of the report.

   - To import a specific report output version, click **Select a specific output version** and, in the **Version** box, click the version that you want.

     Multiple versions of a report exist only if the report is a burst report and has more than one burst key, or if the report has multiple language outputs. Multiple output formats, such as XML or HTML, are not considered distinct and separate versions of a report.

     You need only read permission to view a report output version.

7. If you selected **Select a specific output version**, on the **Select Report Properties** page, click the burst key, or language version, that you want to import, and click **Next**.

   The burst key is the data item that contains the recipient information on which the report is burst. This information can be an email address or an expression that results in a search path to an object in Content Manager, such as an account, group, role, contact, or distribution list. As a burst recipient, you see only the data that is meant for you.

8. Choose whether to accept the default import setting:

   - To accept defaults for placement and layout of report content, click **Finish**.

     The selected report elements appear in the workbook, and your import is complete.

   - To choose settings for the placement and layout of report content, click **Next**.

     Tip: To jump to a particular page in the wizard, click the element or options page listed in the left navigation pane of the wizard.

9. On the **Select Report Elements** page, click the report elements that you want to place in the workbook and click **Next**.

   Elements in italics are elements that the report author set with the **Conditional Rendering** attribute, which specifies which objects are rendered when a report is run. Conditional rendering is not the same as showing or hiding objects. If the object is not rendered, it is not available in the report.

10. In the **Name** box, type the name of the element to import.

    If the element was imported to this workbook already, a unique named range for this instance of the element is assigned. If you choose, you can assign a named range, using no more than 215 characters.

11. In the **Location** box, type the sheet, column, and row designation.

    Tip: Click the button to the right of the **Location** box to select a cell range in the active workbook. The default is the active or current cell of the active workbook. Leave the **Location** box blank to automatically fit content after the previous element.

12. Select the workbook options that you want.

    Depending on the type of report, workbook options can include the following.

Option	Description
Hide Labels	Hides or shows labels for row or column metadata.
Repeat Labels	Repeats labels for row or column metadata.
Group	Groups row or column items using the Microsoft Office Excel Group feature. After content is placed in a workbook, you may need to expand items to see the data in rows and columns.
Import as an Excel List	Shows items as a list, which enables list controls at the top of each column. This feature is not supported in Microsoft Office Excel XP.
Ignore Formatting	For list report elements, imports numeric data without formatting or masks.
Automatically resize columns	Adjusts the column size to fit the contents

13. Click **Next**.
14. For each report element, repeat steps 10 to 13.

    Tip: At any time, click **Finish** to accept the default settings and locations. The remaining elements use the settings from the last element that you set.

15. Click **Next**, and then click **Finish**.
16. If this is a prompted report, enter prompt answers and click **OK**.

    For information about prompted reports, see "Working with Prompted Reports" (p. 24).

The selected report elements appear in the workbook. Graphs and charts are imported as images.

Import Cognos Report Elements into Microsoft PowerPoint

You can import report content from a variety of Cognos reports into your PowerPoint presentation. By default, report content is imported to the active slide. You can also choose to place content on a new or existing slide.

As you import report content into PowerPoint, keep in mind the following:

- Charts are imported as image objects but you can add borders and resize and reposition the objects.
- Lists and crosstabs are imported as table objects.

We recommend that you select report elements that can be sized to fit on a slide.

Steps

1. In Cognos 8 Go! Office, click the **Browse Content** tab.
2. Expand the list of reports from the top node and click the report that you want to import into the presentation.
3. Click **Import Content**.

   The **Import Content** wizard appears.

   If this report was imported into this presentation already, a unique name for this instance of the report is assigned.
4. If you want to change the default name, in the **Name** box, type a name using no more than 215 characters, and click **Next**.
5. Under **Report pages**, choose from the following.
   - To ignore pages and insert content on designated slides, click **Ignore paging**.
   - To create new slides for each page of the report, click **Create new slides for report pages**, and then select a slide that precedes the content that you are importing.

     By default, it is the active slide.
6. Under **Report version**, choose whether you want to refresh or import content from a specific report output version:
   - To run a report version with the most recent content changes, click **Run the report**.

     You must have execute permission to run a report. You must have read and traverse permissions for the folder that contains the report. If you have only read permission, you can view only output versions of the report.
   - To import a specific report output version, click **Select a specific output version** and, in the **Version** box, click the version that you want.

     Multiple versions of a report exist only if the report is a burst report and has more than one burst key, or if the report has multiple language outputs. Multiple output formats, such as XML or HTML, are not considered distinct and separate versions of a report.

     You need only read permission to view a report output version.
7. If you selected **Select a specific output version**, on the **Select Version Parameters** page, click the burst key or language version that you want to import, and click **Next**.

   The burst key is the data item that contains the recipient information on which the report is burst. This information can be an email address or an expression that results in a search path to an object in Content Manager, such as an account, group, role, contact, or distribution list. As a burst recipient, you will see only data that is meant for you.
8. Choose whether to accept the default import setting:

- To accept defaults for placement and layout of report content, click **Finish**.

  The selected report elements appear in the presentation on the active slide, and your import is complete.

- To choose settings for the placement and layout of the report content, click **Next**.

  Tip: To jump to a particular page in the wizard, click the element or options page listed in the left pane of the wizard.

9. On the **Select Report Elements** page, click the report elements that you want to place in the presentation and click **Next**.

   Elements in italics are elements that the report author set with the **Conditional Rendering** attribute, which specifies which objects are rendered when a report is run. Conditional rendering is not the same as showing or hiding objects. If the object is not rendered, it is not available in the report.

10. In the **Name** box, type the name of the element to import.

    If this element was imported into this presentation already, a unique name for this instance of the element is assigned. If you choose, you can assign a name using no more than 215 characters.

11. In the **Location** box, click the slide number.

    Tip: Click the **New Slide** button to the right of the **Location** box to add a slide to the presentation.

12. If the element is a crosstab or list element, choose how you want to show it on the slide using the following options.

Option	Description
Import as a chart object	Imports the element as a chart object.
Number of rows to display	Used to fit larger reports on a slide. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of rows based on the content that is being imported. For objects, including repeater tables, that have more than 25 rows, the content is truncated to 25 rows, which is the PowerPoint maximum.
Number of columns to display	Used to fit larger reports on a slide. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of columns based on the content that is being imported. For objects, including repeater tables, that have more than 25 columns, the content is truncated to 25 columns, which is the PowerPoint maximum.

13. Click **Next**.

14. For each report element, repeat steps 10 to 13.

Tip: At any time, click **Finish** to accept the default settings and locations. The remaining elements use the settings from the last element that you set. To put each report element on a new slide, in the **Location** box click **New Slide**.

15. Click **Next**, and then click **Finish**.
16. If this is a prompted report, enter prompt answers and click **OK**.

    For information about prompted reports, see "Working with Prompted Reports" (p. 24).

The selected report elements appear in the presentation. Graphs and charts are imported as images.

Import Cognos Report Elements into Microsoft Word

You can import report content, including data, metadata, headers, footers, and charts, from a variety of pre-authored Cognos reports. You must select the report elements that you want to work with in your Word document. By default, report content is imported to the main flow of the active page. You can choose to place some types of content in its own floating text box.

Imported elements can be copied or moved between document pages, headers, and footers by using Windows **Copy** and **Paste** commands. Each copy of an element retains its link to Cognos 8 Go! Office. Changing the number of rows or columns in a table changes the amount of data that is refreshed. The shape accommodates as much data as it can fit. If the **Autosize** option is used, the application adds or deletes rows or columns as necessary.

Select report elements that can be sized to fit on a page.

Steps

1. In Cognos 8 Go! Office, click the **Browse Content** tab.
2. Expand the list of reports from the top node and click the report that you want to import into the document.
3. Click **Import Content**.

   If this report was imported into this document already, a unique name for this instance of the report is assigned.
4. If you want to change the default name, in the **Name** box, type a name using no more than 215 characters.
5. Under **Report pages**, choose from the following.
   - To ignore the report page breaks and feed the content continuously down the Word document pages, click **Ignore paging**.
   - To place content on Word document pages using page breaks, column breaks, text wrapping breaks, or section breaks, click **Insert breaks between report pages**, and then, in the **Location** box, click the pagination option to control where Microsoft Word positions automatic page breaks.

6. Under **Report version**, choose whether you want to refresh or import content from a specific report output version:
   - To run a report or report version with the most recent content changes, click **Run the report**.

     You must have execute permission to run a report. You must have read and traverse permissions for the folder that contains the report. If you have only read permission, you can view only output versions of the report.
   - To import a specific report output version, click **Select a specific output version**, and in the **Version** box, click the version that you want.

     Multiple versions of a report exist only if the report is a burst report and has more than one burst key, or if the report has multiple language outputs. Multiple output formats, such as XML or HTML, are not considered distinct and separate versions of a report.

     You need only read permission to view a report output version.
7. If you selected **Select a specific output version**, on the **Select Version Parameters** page, click the burst key or language version that you want to import, and click **Next**.

   The burst key is the data item that contains the recipient information on which the report is burst. This information can be an email address or an expression that results in a search path to an object in Content Manager, such as an account, group, role, contact, or distribution list. As a burst recipient, you will see only data that is meant for you.
8. Choose whether to accept the default import setting.
   - To accept defaults for placement and layout of report content, click **Finish**.

     The selected report elements appear in the document, and your import is complete.
   - To choose settings for the placement and layout of report content, click **Next**.

     Tip: To jump to a particular page in the wizard, click the element or options page listed in the left navigation pane of the wizard.
9. On the **Select Report Elements** page, click the report elements that you want to place in the document and click **Next**.

   Elements in italics are elements that the report author set with the **Conditional Rendering** attribute, which specifies which objects are rendered when a report is run. Conditional rendering is not the same as showing or hiding objects. If the object is not rendered, it is not available in the report.
10. In the **Name** box, type the name to import.

    If the element was imported into this document already, a unique name for this instance of the element is assigned. If you choose, you can assign a name using no more than 215 characters.
11. Depending on the type of report and the elements that you are selecting, you must specify some or all of the following options for each element.

Option	Element	Description
Insert a break before this element	All elements	Inserts a break before the element.
Import as an inline field code	Text elements	Places the element in the main text flow as a Microsoft Word field code.
Import as a floating text box	Text elements	Creates a separate floating text box that can be moved around the page.
Import as an inline picture	Image	Imports the image inline with the text. This is the best option for small images that fit inline with text.
Import as a floating picture	Image	Imports the image in its own floating box. This option gives you the most control over how the image appears on the page.
Repeat header rows at the top of each page	List	Creates a running header on each page of the Word document. You can also create a running header by copying elements into the Word header.
Number of rows to display	Crosstab, List element	Used to fit larger reports on a page. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of rows based on the content that is being imported. For objects, including repeater tables, that have more than 32,000 rows, the content is truncated to 32,000 rows.
Number of columns to display	Crosstab, List element	Used to fit larger reports on a page. When set to 0 (zero), the default with autosize set to **True**, the application automatically sets the number of columns based on the content that is being imported. For objects, including repeater tables, that have more than 63 columns, the content is truncated to 63 columns.

12. Click **Next**.
13. For each report element, repeat steps 10 to 12.

    Tip: At any time, click **Finish** to accept the default settings and locations. The remaining elements use the settings from the last element that you set.
14. Click **Next**, and then click **Finish**.
15. If this is a prompted report, enter prompt answers and click **OK**.

    For information about prompted reports, see "Working with Prompted Reports" (p. 24).

The selected report elements appear in the document. Graphs and charts are imported as images.

Working with Prompted Reports

Prompts act as questions that help users to customize the information in a report. For example, through the use of prompted reports users can select a product type. Only products belonging to the selected product type are retrieved and shown in the report. By using Cognos 8 Go! Office, users can answer prompts from imported report elements. The prompts appear after an import is complete if the report has unanswered prompts. If you set and saved default answers for the prompts, Cognos 8 Go! Office uses those answers.

You can work with prompts in Cognos 8 Go! Office by changing prompt values (p. 24) or removing prompt values (p. 26).

Change Prompt Values

After prompts are set the first time in the Cognos Viewer window and the report is imported into a Microsoft Office document, you can change prompt answers or set answers for prompts.

Type	Description	Application
Specified Value	Sets the answer to the prompt. Users must provide a prompt value, which appears in the **Use Value** box. The value is saved for future renditions of the Office document.	Excel, Word, and PowerPoint
Always Prompt	Requires the user to be prompted. No value is saved and the user is prompted each time the report is refreshed.	Excel, Word, and PowerPoint
Cell Value	Specifies an Excel cell for the prompt answer and requires that the cell reference be typed into the **Cell Reference** box, where the worksheet, column, and row location is saved for future renditions of the workbook.	Excel only

Type	Description	Application
Custom Property	Specifies the name of the user-defined custom document property that is stored with the workbook or document. The name must match the name that is entered in the Microsoft Office custom document property, and is saved for future renditions of the Office document. The prompt answer is assigned to the custom property. If the <prompt> value is entered in the Microsoft custom document property, users are prompted the first time the report is run or refreshed, and that value is saved.	Excel, Word, and PowerPoint

Steps

1. In the Cognos 8 pane, on the **Manage Data** tab, in the **Properties** pane, expand the **Prompt** list.

   The list of parameters appears.

2. Expand each of the parameters.

3. Choose one of the prompt options:

   - To define the value for a prompt, in the **Type** box, click **Specified Value**, and then, in the **Use Value** box, type the prompt answer, which is saved for future renditions of the Microsoft Office document.

   - To define the Excel cell reference for the prompt value, in the **Type** box, click **Cell Value**, and then, in the **Cell Reference** box, click the ellipsis (...) button, type the cell location, such as Sheet1!A7, and click **OK**. In the cell location that you specified, type the prompt value.

   - To prompt the user for a value whenever the report is imported into the Microsoft Office document, in the **Type** box, click **Always Prompt**.

   - To prompt the user for an initial value that is used for the same prompt in multiple reports in a document, in the **Type** box, click **Custom Property**, and then, in the **Custom Property** box, type the name of the custom document property.

     From the **File** menu, click **Properties**, and then click the **Custom** tab. In the **Name** box, type a name for the custom document property. The name you enter must match the name in the **Custom Property** box in the **Properties** pane.

     In the **Type** box, click the data type for the property that you want to add.

     In the **Value** box, type the prompt answer based on the data source:

     If the data source is dimensionally modeled relational data that does not contain a member unique name (MUN), type **<prompt>** or the prompt answer.

If the data source is PowerCubes, copy the Member Unique Name (MUN) from the **Use Value** property box. The MUN contains the fully qualified path to where the member exists in the multidimensional structure.

The value you enter is saved for future renditions of the Microsoft Office document. Users are prompted the first time the report is run or refreshed.

Tip: You can use VBA and a command line interface to set the value of a custom document property. The API can be called within the Microsoft document using VBA to run through the list of prompt answers to get the results that you want.

In some cases, the display value for the prompt is not the same as the use value. The use value is the value in the data source and this must be used for any cell references created in Excel.

Remove Answers to Prompts

Remove answers to prompts if you want users to be prompted when they open the Microsoft Office document or when they refresh data. This ensures that report content is refreshed without any defaults.

This procedure is performed at the report level. It affects all the answers to all the prompts in the report elements that are imported into the Microsoft Office document.

After removing answers to prompts, you can save the workbook, document, or presentation to Cognos Connection where other users can access it using their own security privileges.

Steps

1. In the **Manage Data** tab, right-click a report.
2. Click **Remove Prompts**.

Working with Reports and Content

Cognos 8 Go! Office is fully integrated with Cognos 8 Business Intelligence and Cognos Connection. You can run reports from PowerPlay Web and the studios, such as Analysis Studio, Query Studio, or Report Studio. Metrics objects can be rendered in Cognos 8 Go! Office if they are defined in a report. You can use Cognos 8 reports for multidimensional analysis and exploring large data sources, creating simple queries and reports, or authoring more complex ones in Cognos 8 for Microsoft Office reporting.

When you import content into Cognos 8 Go! Office, the application runs reports on the report server. If your user privileges do not permit you to run some reports at some times, you cannot import content into Cognos 8 Go! Office at that time either.

Report Output Versions

Reports are run directly against the data source so that they reflect the latest data. However, viewing the most recent data may not always meet your needs. You may want to view a report or refresh

your content from older data. For example, you may want to compare monthly sales volume for a product before and after new features are added.

You may want to view saved report output versions because you do not have permission to run the reports or you do not want to rerun a report for the current period.

Report outputs are created when

- users schedule a report
- a report has multiple formats or languages
- a report has a delivery method of save, print, or email
- a report is burst

To run saved report output versions, your administrator must have selected the **Enable enhanced user features in saved output versions** option when the report version was run or saved in any of the studios. Your administrator must manually set this option for every Cognos 8 report version that requires access from Cognos 8 Go! Office.

Report output versions are listed by report format, such as HTML, PDF, or XML. By default, the list contains report output versions for the language that is defined in your content locale. If no report versions are found for that language, the first report version, regardless of locale, is shown. If you have both read and execute permissions, you can choose to either view older data or run the report to retrieve the most recent content.

To run a specific output version and retrieve the most recent content, you must have execute and traverse permission for any package, model, and data source used by the report. To view a specific output version, you must have read and traverse permissions to the folders or packages that contain the reports.

If the report is a burst report, burst keys appear under **Report Selection** in the **Properties** pane on the **Manage Data** tab.

The report is run only when you refresh data and the **Version** property is set to **Run**.

To work effectively with reports and report content, you can do the following in your preferred Microsoft application:

- Run reports in PowerPlay Web, Analysis Studio, and Report Studio (p. 27).
- View report output versions (p. 28).
- View source and version information (p. 29).
- Search for reports or content (p. 33).

Run a Report in PowerPlay Web, Analysis Studio, or Report Studio

Run your report to retrieve data from a data source. The report runs in Cognos Viewer with the default options set by the report author. From Cognos Viewer, you can run the report again in the same format or in a different format. If you run the report in CSV or XLS format, the report appears in a new browser window.

From the Cognos 8 Go! Office interface, you can open reports and even change report content in PowerPlay Web, Analysis Studio, or Report Studio. You can make changes and save the results to the Cognos Connection portal. New or updated reports are then available to other users through Cognos Connection or Cognos 8 Go! Office.

If you are in Cognos 8 Go! Office and you view a report in the Excel format using Internet Explorer in Cognos 8, the Cognos 8 pane in Cognos 8 Go! Office is hidden by other Excel objects. To avoid this, you must open Microsoft Office documents in their native applications instead of using Internet Explorer. To show the Cognos 8 pane, you can click the **Cognos 8** button on the Cognos 8 for Microsoft Office toolbar. Or, from the **Tools** menu, click **Customize** and select the **Cognos 8** check box.

If you are viewing a report in Excel or CSV format, you can save the output of the report only to the file system. You cannot save it to Cognos Connection from Cognos Viewer. In this case, you can close Cognos Viewer, and publish the report output from Cognos 8 Go! Office.

Steps

1. In Cognos 8 Go! Office, click the **Browse Content** tab or the **Manage Data** tab.
2. View a report:
   - On the **Browse Content** tab, click a report, and then click **View Report**.
   - On the **Manage Data** tab, right-click a report name, and then click **View Report**.
3. If you are prompted to specify the range of data included in the report, select the values from each field, and click **OK**.

   The report runs in Cognos Viewer.
4. If you want and are licensed to do so, you can change the report by accessing Analysis Studio or Report Studio.
5. After you finish viewing or changing the report, in the upper-right corner, click **Close**.
6. If prompted to save the report, click **Save**.

You may view or change another report or select the report that you just edited to import it into the Microsoft Office document. After changing report options, you may need to refresh report data. For more information, see "Refresh Report Content" (p. 31).

View or Run Report Output Versions

You can analyze older data in a report by viewing previous report output versions. You can view the most recently saved copy of a report in Cognos Viewer or run it if it was not previously run.

A report output is a snapshot of the data that is current only up to the time that the report is saved. You can view all versions of a report output, including the date, format, and language of each report output.

Depending on the properties set for the report versions, each time that you use the **Refresh All Data** command, you either view an output version of the report or update the imported report with the most recent data.

You must have execute permissions for a report that you want to run. You must have read and traverse permissions for the folder that contains the report.

Steps

1. In Cognos 8 Go! Office, click the **Manage Data** tab.
2. Click the report that you want to update or whose output versions you want to view.
3. In the **Properties** pane, expand **Report Selection**, and then click the **Version** property.
4. Choose whether you want to run or view a report:
   - To import changes since the last stored version or run the report if it was not previously run, click **Run**.

     This option is available only if you selected the option to run the report when you imported it.
   - To view the most recently saved output version of the report, click **Most recent**.
   - To view a specific report output version, click the version that you want.

If you chose **Run**, the next time that you use the **Refresh All Data** command, the report is updated with the most recent data. If you chose a specific output version, the **Refresh All Data** command retrieves data that was available at the time that the report was last saved.

Verify or Change Properties for Imported Data

You can identify the source of data in the Microsoft Office document, as well as the last time that the data was updated. This helps you ensure that you are working with the latest version of the right data.

Report Properties

You can verify or change values for the these Report properties.

Property	Description
Name	The name of the imported report. If a report with the same name already exists in the document, you can change the name to distinguish it from other reports.
Last Refreshed	The date and time when the report was last updated with the most recent content changes.
System	The URI that is the address to the Cognos 8 gateway.

Property	Description
Search Path	The search path that shows the fully qualified location of the report in the Cognos 8 content store.
Version	The property values related to the report output versions available on the Cognos 8 server. If set to **Run**, the report is as current as the last time that it was refreshed. The next time that the specified report version is refreshed, the most recent data is retrieved. If set to a date and time, the report result is current as of the timestamp. The next time that the report is refreshed, the result from the selected output version is retrieved. This data may be older than what is currently available in the content store. For more information, see "Working with Reports and Content" (p. 26).
Burst Key	The dimension or level of a query in the report specification that is used to create, or burst, a set of report results.

Report Element Properties

Verify or change values for the report element properties.

Property	Description
Name	Name of the imported report element.
Element ID	The unique identifier for the imported report element to be reused, usually to take advantage of any applied formatting.
Last Refreshed	Date and time when the report element was last retrieved from the content store.

Steps

1. In Cognos 8 Go! Office, click the **Manage Data** tab.
2. Expand the hierarchical list and click a report.
3. In the **Properties** box, expand the **Report** or **Report Selection** group and verify or change the property values.
4. For a report element, such as a header, in the **Properties** box, verify or change the property values.

   If the report content is a cube, a list of dimensions and the measure is also provided.

After you verify the settings or make your changes, you may choose to refresh the content. For more information, see "Refresh Report Content" (p. 31).

Refresh Report Content

You can refresh the content of reports, including report output versions or scheduled reports, to retrieve the latest updates and changes.

The **Refresh Data** function runs the report or report component, updates the data, and includes any changes to the report hierarchy. Any formatting applied from the Microsoft Office application remains unchanged. In Microsoft Excel, refreshed data may exceed the target range in the workbook, overwriting existing cell contents or named ranges. If this happens, you must move existing named ranges to create an acceptable row or column range for the updated report data.

The **Refresh Data and Formatting** function refreshes data and formatting, such as cell color and number formatting. If you have customized cell formats, the function changes the special formatting to the current report formatting.

Microsoft Excel

The query used to refresh data is a query for the entire report element that you select. Refreshing data may impact the report layout in Microsoft Excel. If you try to insert rows or columns within this imported object, they are overwritten when you refresh the data. If your data or data structure, such as the number of rows and columns, changes on a subsequent refresh, the object resizes, but other elements in the workbook may be overwritten.

Microsoft PowerPoint

The following formatting is preserved when you refresh Cognos data:

- any custom formatting applied in the PowerPoint presentation, such as borders, positioning, and resizing
- any custom formatting applied in the PowerPoint presentation, such as the cell fill, cell borders, font size, and font style

The following formatting is updated when you refresh Cognos data:

- formatting applied to a chart in the Cognos report, such as the palette or legend
- columns or rows added in PowerPoint are overwritten
- columns or rows deleted in PowerPoint reappear

If the **Refresh Data and Formatting** option is applied, all custom formatting within a PowerPoint presentation is lost.

Prerequisites

For a specific report output version, the report property **Version** on the **Manage Data** tab must be set to **Run** to update the report content with the most recent data. For a burst report, the burst key set during the import dictates which version of the report is updated.

Tip: To change the burst key, select the new key from the **Burst Key** property on the **Manage Data** tab.

Step for All Imported Reports in the Microsoft Office Document

- On the Cognos 8 for Microsoft Office toolbar, click the refresh all data button .

All the reports in the workbook, document, or presentation are updated. If you are a burst recipient, you see only data that is meant for you.

Steps for a Specific Report, Report Element, or Component

1. In Cognos 8 Go! Office, click the **Manage Data** tab.
2. Right-click a report element or component.
3. Choose whether to refresh data or refresh data and formatting:
   - To refresh data with formatting, click **Refresh Data and Formatting**.
   - To refresh only data, click **Refresh Data**.

The selected report content is refreshed. If you are a burst recipient, you see only data that is meant for you.

Refresh a Folder

When you log on to a namespace, the Public Folders and My Folders in the Cognos 8 pane that contain any reports or analyses are cached during your session. When the state of a folder changes during the current session, users who have access to the folder are affected. For example, when the folder is deleted, it cannot be accessed.

You can refresh the list of folders that are visible in the **Browse Content** tab of the Cognos 8 pane.

Steps

1. In Cognos 8 Go! Office, click the **Browse Content** tab.
2. Right-click a folder that you want to refresh, and click **Refresh Folder**.

The content server is polled for changes and refreshes the Cognos content tree node.

Remove a Report or Data from a Microsoft Office Document

You can remove reports, specific report elements, data, or reports and data from a Microsoft Office document.

Removing a report breaks the link between the data in the document and the report specification on which that data is based. The data of the report persists in the Office document. In Microsoft Excel, the workbook becomes static and can be used like any other workbook.

Removing data clears the workbook, slide, or document. Removing a report and data completely deletes the report and data from the document.

In PowerPoint and Word, using the **Delete** key to delete an object also deletes the link for that object to Cognos 8 Go! Office. To clear content, such as data or an image from the document, you must use the **Remove Data** option on the **Manage Data** tab. Using this method, you can clear the image and leave a placeholder for the content to be refreshed later.

For Microsoft Excel, the **Delete** key affects only charts and images.

Steps

1. In the Cognos 8 pane, click the **Manage Data** tab.
2. Right-click the report or report element that you want to remove and then click the remove option that you want from the following.

Remove option	Description
Remove Element or Remove Report	Breaks the link between the data in the document and the report on which that data is based
Remove Data	Clears the data from the document while maintaining a connection to the data source
Remove Element and Data or Remove Report and Data	Completely deletes the report and data from the document

Search for Reports or Report Content

Cognos 8 Go! Office includes two modes for searching content: Go! Search Service, and name and description searches.

Cognos 8 Go! Search (Full-Text)

Before implementing Cognos 8 Go! Search, the Cognos 8 Go! Search components must be installed and configured in the existing Cognos 8 environment. The components can be on a different computer from Content Manager.

Use the Cognos Go! Search Service to perform full-text searches of content published to Cognos 8. The service examines the full content of the document, and not just the titles. For example, if you search on customer name, products, locations, or any other search criteria, the results are not just based on whether these things appear in the document name, but when and where they appear in the content.

Searches automatically include word variations. For example, if you enter the word tent as the search term, the search results show entries that include tent and tenting. Words that contain tent, such as retention, are not included in the results.

The results for searches that use multiple words include entries that include all search terms, and entries that contain only one of the search terms. You can use search operators such as + (plus), -

(minus), or " " (quotation marks) to modify the default behavior when searching using multiple words.

Cognos 8 security settings apply to search results. Only content to which a user has access appears in the search results.

Name and Description Search

Use the name or description search to search for reports whose name, description, or both match the string entered in the search criteria.

The following table shows examples of search criteria and results.

Method	Search criteria	Results
Contains the exact string	Revenue A	"Revenue A", "Revenue ABC","Copy of Revenue A"
Starts with the exact string	revenue	"revenue A", "Revenue ABC"
Matches the exact string	Revenue	"Revenue", "revenue"

Steps Based on Full Text

1. In the Cognos 8 pane, click **Search**.
2. In the **Server** box, click the Cognos 8 server that contains the content that you want to include in the search results.
3. In the **Search** box, click the **Full text** link.
4. Click the search button .

   The **Result** pane shows results that are ranked with the most relevant content at the top of the list.
5. If you want to refine the search content, do the following:
   - Click the left arrow in the **Result** pane.

   The **Refine By** tree shows additional details about the source locations of the search results.
   - Select items from the **Refine By** tree.

     If you select more than one item, you can choose to show results that include all selections, or any of the selections.
   - Use the advanced options to limit the search to a specific entry type.

If you select more than one item, you can show results that include all selections, or any of the selections.

Steps Based on Names or Descriptions

1. In the Cognos 8 pane, click **Search**.
2. In the **Server** box, click the Cognos 8 server that contains the reports that you want to include in the search results.
3. In the **Search** box, click the applicable link for searching on name, description, or both.
4. In the **Search** box, type the phrase that you want to search.
5. In the **Method** box, choose the type of match between the search string and the results:
   - To return entries that include the search strings somewhere in the name or description, click **Contains the exact string**.
   - To return entries whose name or description begins with the search string, click **Starts with the exact string**.
   - To return entries whose name or description matches the search string word for word, click **Matches the exact string**.
6. In the **Modified** box, click the date that the report was last modified.

   For example, if you want the search to return reports that were updated in the last week, click **In last week**.
7. In the **Scope** box, click the folders that you want to include in the search.
8. Click the search button .

The reports that match the criteria and that you have permissions to view, appear in the **Result** pane.

Save a Microsoft Office Document Created Using Cognos 8 Go! Office

You can save documents that you create using Cognos 8 Go! Office with or without data. If you save the document with data, the data is not refreshed on opening the document. You must refresh the data manually.

Saving documents without data may be a way of enforcing best practices, such as refreshing data upon opening the document and respecting security. By saving documents with data, users without Cognos 8 Go! Office and users not connected to the network can view numbers.

Steps

1. Choose whether to save the document with data:

- To save the document with the most up-to-date data, on the **Manage Data** tab, right-click the report, and then click **Refresh Data**.
- To save the document without data, on the **Manage Data** tab, right-click the report, and then click **Remove data**.

2. From the **File** menu, click **Save**.

Open Cognos Connection from a Microsoft Office Application

Cognos Connection is the portal to Cognos 8 and provides a single access point to all corporate data available in Cognos 8. You can use Cognos Connection to work with entries such as reports, analyses, queries, agents, metrics, and packages. You can also use it to create and run reports and cubes, and distribute reports.

Steps

1. In the Cognos 8 pane, click the **Browse Content** tab.
2. Right-click a folder that contains the packages, reports, or analyses that you want to use in Cognos Connection, and click **Open Folder**.

The folder or report that you selected appears as an entry in the Cognos Connection portal. You can use any of the studios for further analysis and exploration.

Chapter 3: Best Practices and Guidelines

Cognos 8 Go! Office provides a wide variety of options and choices. These options can be an area of uncertainty for report consumers who must make numerous decisions when choosing how to lay out a report for consumption and analysis. This section provides guidelines to make these decisions easier, and outlines our recommendations for importing Cognos 8 reports and authoring custom reports within the Microsoft Office applications.

Using Cognos 8 Go! Office

In Cognos 8 Go! Office, you can include business intelligence content in your presentations or documents and update the content in the Microsoft Office applications. Cognos 8 Go! Office provides the following benefits:

- augmenting the business intelligence data with commentary or explanations
- illustrating written information
- bringing together business intelligence content from other sources
- collating elements of diverse reports into a single presentation or document

Limitations

Cognos 8 Go! Office was designed to help you take advantage of the various layout capabilities in the Microsoft applications. It does not replicate the specific layout and formatting of the source Cognos 8 reports.

Cognos 8 Go! Office does not include the report production capabilities that are available in Cognos Connection or Cognos Viewer. For example, you cannot schedule or burst reports from any of the Microsoft applications. However, you can use the capabilities in Microsoft Office to manage and distribute the Cognos 8 content that best suit the needs of the organization. To achieve distribution functionality similar to Cognos Connection or Cognos Viewer, you must use custom scripting. For more information, see the automation chapter in the Cognos 8 for Microsoft Office *Getting Started*.

Report Design

When importing Cognos 8 content, you decide which elements to import and how to arrange them on the page, worksheet, or slide. There are key areas that affect the final display and functionality of your reports.

A report consists of three main areas: the header, the footer, and the body. The headers and footers may include text, such as page numbers, or images. The body includes report types such as lists, crosstabs, charts, maps, or repeaters. It is important to understand how report elements behave if they grow and displace other elements. The report elements may grow either horizontally or vertically,

depending on repeaters or repeater tables, content size, and rendering-specific reasons, such as font substitutions.

Recommendation - Limit Chart Metadata

Limit chart metadata in image maps to what can be seen as a static image.

Microsoft Office Excel, Microsoft Office PowerPoint, and Microsoft Office Word do not support image maps. Charts are imported as images and do not have the context sensitivity and data values that appear when that same image map is viewed in Cognos 8.

For Word and PowerPoint, we recommend that you create images with transparent backgrounds so that they take the background color of the page or slide.

Recommendation - Add Report Objects

In the **Manage Content** tab on the Cognos 8 pane, you can click items and see how they are positioned in the workbook. You can refresh individual objects by clicking the report and expanding the list and then right-clicking the report element.

To make multiple copies of an item, it is better to import the item again and place it in the Microsoft Office document. Report elements have different behavior based on the type of object that it is.

Recommendation - Specify Page Breaks

Report authors determine how to break and number the pages of a Cognos 8 report by specifying options in Report Studio. Cognos 8 Go! Office does not respect the page size settings in Report Studio.

If the report is wider than the defined page width, the report will break across multiple pages horizontally.

In Cognos 8 Go! Office, you must specifically include page breaks to break the report into multiple pages. This is accomplished using options, such as **Insert breaks between report pages**, in the **Import Content** wizard. The page break feature respects only the pages that were authored in the report specification. For example, if the report specification has a title page and a report page, if you select the **Insert breaks between report pages** option, a hard page break is inserted between the title page and the report page. If page breaks are not specified, soft page breaks, also known as logical page breaks, are calculated at run time.

Report Design Tips

This section provides general information, best practices, and tips for importing report elements and then designing customized reports. It is intended to provide a starting point for design questions and is an overview of the capabilities of Cognos 8 Go! Office.

Layout Principles

The way in which text, tables, and other objects are laid out onto the pages of the various Microsoft Office applications can be described as a specific layout model in the application that is used to create the document.

For example, the layout model for Excel is the cells, which are treated as a single, large table. For PowerPoint, the layout model is the canvas style in which layout objects are placed at *x* and *y* coordinates that may result in overlapping objects with no flow beyond the page. For Word, the layout model is a flow-based style in which text and objects are placed one following the other, breaking into new lines and pages when they flow beyond the page or when certain rules are applied.

Importing Cognos 8 Report Layouts

The layout model in Report Studio closely resembles the flow-based model used in Word. As such, flow-based Cognos 8 reports translate well when imported into Word. However, Report Studio also supports objects that are embedded within a list or crosstab. Report authors use these complex layouts to control where objects appear in the report.

When these embedded objects are converted to tabular representation, they are not rendered in the same way as when they appeared in Report Studio. Cognos 8 Go! Office does not import tables that are used as container objects. If the layout structure is complex, the import process may not correctly detect the embedded tables and ignores them. As a result, these tables are not available as elements that can be imported into any of the Microsoft applications.

In both Excel and PowerPoint, neither the flow-based model nor the embedded objects are rendered properly. You must use the tools available in these applications to lay out objects in your reports. This means that in Excel, you must tie the objects to a cell, and, in PowerPoint, you must arrange the objects on a canvas.

Recommendation - Protect User Access to Data

Create and manage your Microsoft Office templates for a wide variety of users.

For example, for regional sales managers, you can create a master template that contains all your corporate data.

Use the **Remove Data** command to clear the document of secure data items. Publish the document to Cognos Connection and give each manager access to the document. When the data is refreshed, each regional manager sees the data only for his or her region.

Recommendation - Publish Data with Fixed Content

Publish data with fixed content to prevent changes from the content store. You can send the Microsoft Office document to someone who does not have Cognos 8 for Microsoft Office installed or does not have a license for it.

Break the link between the Microsoft Office document and Cognos 8 Go! Office.

Use the **Remove Report** function if you want to present part of the Microsoft Office document with fixed data. In this case, fixed corporate data that all regional managers should view could be added

to the master workbook, presentation, or document. Then the link from the report to the document can be deleted while leaving the common data in the cells, slide, or document.

Recommendation - Avoid Nesting Objects

Although you can import repeaters, repeater tables, and objects in conditional blocks, list objects embedded within list objects may cause problems due to the limitations of the target Microsoft application.

The report author must design reports that are optimized for your Microsoft Office integration needs. That means ensuring that there is minimal formatting so that Office users can more easily use Microsoft Office formatting capabilities with the Cognos content.

Recommendation - Maintain Table Size to a Minimum

All of the supported Microsoft Office application impose restrictions on the number of rows that they can create and effectively show. For example, the original maximum size for a table in PowerPoint is 25 rows by 25 columns. Although you can add rows, the expanded table may not appear correctly on a single slide.

For effective use of PowerPoint and Word, maintain the size of the tables to comply with restrictions in the Microsoft Office application. For all the Microsoft applications, large tables affect performance during an import operation.

Recommendation - Define Image Properties

Do not rely on the report context, such as row height or column width, to define the size of images.

The report author must explicitly specify the height and width of the image.

Techniques in Microsoft Excel

You can apply best practices to access Cognos content and customize reports in your Excel environment.

Recommendation - Reference Records in Large Worksheets

You may want to reference records in large Excel worksheets.

If you insert rows and columns into the middle of imported report tables after a refresh, the inserted rows and columns are overwritten or will not necessarily line up.

It is better to import report tables into a data worksheet and then access that data with horizontal (HLOOKUP) and vertical (VLOOKUP) lookup functions to supply summary data in another part of the workbook. You use VLOOKUP when you need to search through one or more columns of data, and you use HLOOKUP when you need to search through one or more rows of data.

If you want the lookup functions to return exact matches, you must sort the values in your table array in ascending order.

For more information, see the Excel *Online Help*.

Recommendation - Refresh Data Without Formatting

Format content in Microsoft Excel using data formats.

If formatting is applied to cells and the refreshed data shifts, the cell formatting does not move to the new location. This can change the meaning of data.

If you use extensive formatting, refresh data without formatting so that the changes you make are not overwritten by formatting changes in the original report.

Report Rendering

You should be aware of some of the unique limitations of Microsoft Excel that affect the rendering of pre-authored Cognos 8 reports.

Maximum Number of Pages in Long Reports

To prevent Microsoft Excel from generating an error, you should keep track of the number of pages in lengthy reports.

Microsoft Excel can support a maximum number of worksheets per workbook, limited by available memory. If the report pages exceed that limit, Microsoft Excel generates an error.

When you import report elements from Cognos 8, you can choose the **Create new worksheets for report pages** option in the **Import Content** wizard. When this option is chosen, each page in a report becomes a worksheet in Excel.

Color Differences in Rendering to Microsoft Excel

Microsoft Excel supports a predefined set of colors. When a report is rendered, Excel tries to best match the report colors to those in its standard color palette for workbook elements.

Page Headers and Footers

The Excel headers and footers have a restriction of 255 characters. Excel truncates the string if it contains more than 255 characters.

Images

An image can be a logo or a picture, or it can be a picture that is repeated with rows of data.

If the report author used a URL-based image in a report, the image contains a URL that points to an image on the Cognos 8 report server. When images are rendered to Excel, they are rendered as static pictures.

If your credentials do not have sufficient rights to access the image, the image will not be shown in the report.

Lists

If the report element that you are importing is a list, you can choose to import it as an Excel list by selecting the **Import as an Excel list** option in the **Import Content** wizard. This means that you can easily manage and analyze groups of related data in a worksheet. When you designate a range as a list, you can also manage and analyze the data in the list independently of data outside the list. For example, using only the data contained in the list, you can:

- filter columns

  By default, the AutoFilter is enabled in the header row so that you can filter and sort your data quickly.

- add a row for totals

  When you click a cell within the total row, a drop-down list of aggregate functions becomes available.

Report Design Tips

This section provides general information, best practices, and tips for importing report elements and then designing customized reports in Microsoft Excel.

Recommendation - Use Page Breaks to Improve Performance of Large Reports

Microsoft Excel has no default notion of a page size. As a result, if you have a large report, Excel tries to render it as a single worksheet.

If you do not specify page breaks for a report that returns a large amount of data, some report formats try to render a report as a single page.

When importing report elements, you can use the **Insert breaks between report pages** option in the **Import Content** wizard.

In general, using page breaks improves the performance of users accessing the report because they can view the first page while the rest of the report is being rendered.

Recommendation - Apply Cell Formatting to Negative Numbers

Apply cell formatting to negative numbers.

To highlight negative numbers in red, apply the cell formatting in the cell number property instead of the font color. If the data changes, the cell remains red if it is applied as red to the font, but reverts to black if the negative number format is applied.

Recommendation - Use the Excel List for Data Validation

Use the Excel list feature with the Cognos 8 Go! Office cell reference option to provide data validation.

By entering possible values in a column and designating that column as an input validation list in Excel, you can select data values for use with Cognos 8 Go! Office cell reference.

For more information, see the Excel *Online Help*.

Techniques in Microsoft PowerPoint

You can apply the following best practices to access Cognos content and customize reports in your Microsoft PowerPoint environment.

You should be aware of some of the unique limitations of Microsoft PowerPoint that impact rendering pre-authored Cognos 8 reports.

Recommendation - Use Copy and Paste Commands

Imported elements can be copied or moved between slides by using Windows **Copy** and **Paste** commands.

Each copy of an element retains its link to Cognos 8 Go! Office. Changing the number of rows or columns in a table changes the amount of data that is refreshed into that shape, unless the **Autosize** option is used, in which case the application adds or deletes rows or columns as necessary. The shape accommodates as much data as it can fit.

Do not delete objects manually. Always use the **Remove Data** link or **Clear All Data** toolbar button . Otherwise, the object placeholder is lost and the item can no longer be refreshed.

Recommendation - Create PowerPoint-specific Tables and Charts

Create tables and charts specifically for importing into PowerPoint.

In PowerPoint, tables are limited to 25 rows and 25 columns. Create report tables and lists that fit within these requirements and still provide the data that you want.

After editing tables and then refreshing data, the table reverts to the unedited version. For example, if you delete multiple rows and then refresh data, the deleted rows are added back in to the table.

Edit tables in Cognos 8 before importing. This eliminates the need to delete unwanted rows after refreshing data.

Techniques in Microsoft Word

You should be aware of best practices before accessing Cognos content in your Microsoft Word environment.

Recommendation - Create Tables and Charts

Create tables and charts specifically for importing into Word.

In Cognos 8 Go! Office, in the Microsoft Word environment, tables are limited to 32,000 rows and 63 columns.

Create report tables and lists that fit within these requirements and still provide the data that you want.

Recommendation - Create Text Box Titles

Create text box titles for report elements.

You can get more smart tags created by Microsoft or by third-party companies, who may design smart tags and actions for the specific products or services that you work with. For example, if you work in a sales department, you may be able to click a product name smart tag in your document that offers actions such as check quantity in stock, or price.

Use the text box in the header or footer. Import the report once specifying only the header, which you insert into the section header or footer so that the report labels can be used as smart tags. The data will be recognized and labeled as a particular type on which you can perform actions.

Finally, import the report again as a second report element to get the text that you want in the header or footer.

Recommendation - Import Text as Field Codes

Combine inline field codes with introductory text to create introductory language for report tables, charts, and other objects.

Text appears as other text and can be formatted using Word paragraph and character styles. Because they are field codes, they can still be distinguished as Cognos 8 Go! Office content.

If you want to present report content in line with other text in the document, import the text as field codes using the **Import as inline field code** option.

Chapter 4: Troubleshooting

Use this troubleshooting reference information and solutions as a resource to help you solve specific problems you may encounter during or after the installation of Cognos 8 Go! Office components.

Troubleshooting Resources

Troubleshooting resources are sources of information that can help you resolve a problem that you are having with a product.

Generally, sources of troubleshooting information include logs, debugging modes, documentation, and technical support. In addition to this document, the following troubleshooting resources are available when you work with Cognos 8 Go! Office:

- error messages (p. 45)
- log files (p. 45)
- Windows Event Viewer (p. 46)
- samples (p. 46)
- Knowledge Base of the Cognos Global Customer Services Web site (p. 46)
- Cognos Global Customer Services (p. 47)

Error Messages

The first indication of a problem is often an error message. Error messages contain information that can be helpful in determining the cause of a problem.

Log Files

Log files can help you troubleshoot problems by recording the activities that take place when you work with a product. Operations performed in Cognos 8 Go! Office are recorded in a log file for tracking purposes.

Before you begin viewing log files, ensure that they contain the information that you need. The number of log files and the information they contain are set by parameters that you control. In most cases, the log file is locked while the application is running. To email the log file, you must exit the application first before copying it.

When troubleshooting, the following files can assist you:

Cognos Server Log File

This file contains information about the Report Data Service processes.

Cognos 8 for Microsoft Office Log File

This file contains information about Cognos 8 for Microsoft Office processes. You turn this log on or off by setting the **Enable Logging** check box in the **Options** dialog box in Cognos 8 for Microsoft Office.

For more information, see the Cognos 8 for Microsoft Office *Getting Started*.

Windows Event Viewer

Windows Event Viewer provides information about program, security, and system events. For example, if a Cognos service fails to start, this fact is recorded in the event log.

Windows Event Viewer does not record information that is specific to operations or tasks performed in Cognos 8 Go! Office. Consult the Cognos 8 for Microsoft Office log file for these problems.

For information about how to use Windows Event Viewer, see the Windows help.

Samples

Cognos 8 Go! Office uses samples to highlight product features and to help you learn how to use the product. You can also use samples to troubleshoot problems. You can use the samples that come with Cognos 8 Go! Office to determine if various components are working together as expected. For example, if you are having a problem running a report, you can try running a sample report to see if the problem persists. You may discover that the problem is related to connecting to a database.

Use the Knowledge Base of the Cognos Global Customer Services Web site

The Knowledge Base of the Cognos Global Customer Services Web site is a database of documents maintained by Cognos support personnel containing problems logged by customers. Consequently, a problem you are experiencing with Cognos 8 Go! Office may already be reported by someone else, and a solution already found. If Knowledge Base does not include the problem you are having, you can call Cognos Global Customer Services for individual assistance. Before you can access Knowledge Base, you must have a valid logon. To obtain one, send an email message to SupportWeb@Cognos.com.

Steps

1. In your Web browser, go to

   http://support.cognos.com/kb-app/knowledgebase

2. In the logon dialog box, type your user name and password, and click **OK**.

   The search page appears.

3. Search through the available documents.

Call Cognos Global Customer Services

If you are unable to resolve a problem using all other troubleshooting resources, call Cognos support to receive immediate help. For information about Cognos support locations and programs, see the Cognos Global Customer Services Web site (http://support.cognos.com).

To contact Cognos Global Customer Services, you must have a current support agreement with Cognos.

Before you call, do the following:

- Ensure that the problem is related to Cognos software and results in a Cognos error message.
- Attempt to reproduce the problem to ensure that it is not just a simple error.
- Check obvious things like file locations, directories, paths, and access.
- Review all relevant documentation, including any release notes or readme files.
- Check to see if any recent changes in your computing environment may be responsible for the problem.

Steps

1. Have the following information at hand:
   - your customer identification number
   - your case reference number, if it is an ongoing case
   - the phone number where you can be reached
   - the version of the software you use
   - the version of the operating environment you use
   - a description of what you were doing when the problem occurred
   - the exact wording of any error messages that appear
   - any steps you took to attempt to solve the problem
2. Contact the Cognos support center nearest you.
3. You are asked whether this is a new or ongoing case. If it is an ongoing case, provide your case reference number or, if appropriate, your customer identification number.

If you don't have support on the software about which you are calling, you will be directed to a support renewal representative.

Common Errors

This section lists the most-common errors that you might encounter with Cognos 8 Go! Office. For a complete listing, which includes numbered error messages and warnings for Cognos 8 products, refer to the Cognos 8 *Administration and Security Guide*.

Configuration Issues

The following issues are related to configuration and setup.

The Cognos 8 for Microsoft Office Interface Fails to Initialize in Microsoft Office

Cognos 8 for Microsoft Office may not initialize when the Microsoft .NET Framework is not installed or the version is not correct. The required Microsoft .NET Framework version is 2.0. Another possible reason for this condition is that the Cognos 8 for Microsoft Office COM add-in is either not installed or not registered.

If you are running the wrong version of Microsoft .NET Framework, uninstall it and then reinstall Microsoft .NET Framework version 2.0.

To install the Cognos 8 for Microsoft Office COM add-in, run the .msi program that is found on the installation disk. For more information, see the Cognos 8 *Installation and Configuration Guide*.

Before you attempt to install Microsoft .NET Programmability Support, you must have installed Microsoft .NET Framework version 2.0.

Cognos 8 Go! Office Does Not Start in Microsoft Word

You open a Cognos 8 Go! Office session in Microsoft Word, but nothing appears to happen.

This can occur if Microsoft Outlook has opened a session of Microsoft Word to edit email messages. To check whether you are using Word to edit emails, in Microsoft Outlook, click **Tools**, **Options**, **Mail Format**. In the **Message format** section of the dialog box, verify the options for editing your emails.

To resolve this problem, close Microsoft Outlook before opening the Microsoft Word document configured for Cognos 8 Go! Office.

Cognos 8 for Microsoft Office Fails to Initialize in Microsoft Internet Explorer

If you use Internet Explorer to browse Cognos 8 and open a workbook, document, or presentation published by Cognos 8 for Microsoft Office, the document launches in Microsoft Office, but without full functionality.

To configure Internet Explorer to open Microsoft Office files in Microsoft Office instead of in Internet Explorer, you must use the Folder Options tool to update browse options. It is also possible to do this in Windows Registry.

Steps to Configure Internet Explorer to Open Microsoft Office Documents in Microsoft Office Applications

1. Open **My Computer**.
2. From the **Tools** menu, click **Folder Options**.
3. On the **File Types** tab, under **Registered file types**, click **Microsoft Excel Worksheet**, and then click **Advanced**.

   The **Edit File Type** dialog box appears.

4. Clear the **Browse in same window** check box and click **OK**.
5. Complete the same steps for Microsoft Office PowerPoint presentations and Microsoft Office Word documents.

Microsoft Office Does Not Open a Microsoft Office Document Published from Cognos 8 for Microsoft Office

If you observe Microsoft Office trying to open a published document twice when you double-click the workbook, document, or presentation from Windows Explorer, the file association is either corrupted or not installed properly.

There are two options to resolve this issue. You can start the Microsoft Office application first, and then open the document using the Open command from the File menu, or you can reregister the file type.

Steps to Reregister Workbook File Types for Microsoft Office Excel

1. From the **Start** menu, click **Run**.
2. Type the following command and click **OK**. You can adapt this command to your environment by providing the proper local drive and location.

   "C:\Program Files\Microsoft Office\Office\Excel.Exe" /regserver

Steps to Reregister Presentation File Types for Microsoft Office PowerPoint

1. From the **Start** menu, click **Run**.
2. Type the following command and click **OK**. You can adapt this command to your environment by providing the proper local drive and location.

   "C:\Program Files\Microsoft Office\Office\Powerpnt.Exe" /regserver

Steps to Reregister Document File Types for Microsoft Office Word

1. From the **Start** menu, click **Run**.
2. Type the following command and click **OK**. You can adapt this command to your environment by providing the proper local drive and location.

   "C:\Program Files\Microsoft Office\Office\winword.exe" /regserver

Unable to Open Published Microsoft Office Documents from Cognos Connection

If the browser does not prompt you to open or save the workbook, document, or presentation, it may mean that the option to prompt before opening was cleared. This option must be reset.

You must enable the **File Download** and **Automatic prompting for file downloads** in Internet Explorer.

Steps to Confirm Opening of Documents

1. Start the **Windows Control Panel**.
2. Double-click **Folder Options**.
3. From the **Folder Types** tab, in the **Registered file types** list, click **Microsoft Excel Worksheet**, and then click **Advanced**.
4. Ensure that the **Confirm open after download** check box is selected and click **OK**.
5. Repeat steps 3 and 4 for other Microsoft Office documents that are supported in Cognos 8 for Microsoft Office, such as **Microsoft Office Excel Template**, **Microsoft PowerPoint Presentation**, **Microsoft Office PowerPoint Template**, **Microsoft Word Document**, and **Microsoft Office Word Template**.
6. Click **Close**.

Steps to Reset Internet Security Options

1. Start **Internet Explorer**.
2. From the **Tools** menu, click **Internet Options**.
3. From the **Security** tab, click the Web content zone for which you are updating these options, and then click **Custom Level**.
4. Scroll down to the **Downloads** section and click **Enable** for the **File download** and **Automatic prompting for file downloads** options.
5. Click **OK** twice.

Error Messages, the .NET shortcut, or the .NET Console Are Not in the Language of the .NET Framework 2.0 That Was Installed

When you install a non-English version of .NET Framework in a non-English operating system, you will notice that the error messages, .NET shortcut and .NET Console are in English.

To solve this issue, you must apply the .NET Framework Language Pack for your language.

The subkey numbers relate to the language as follows: 1033=en-en, 1036=fr-fr, 1031=de-de, and 1041=ja.

If you are missing the language pack subkeys, you must install the .NET language pack, which is available from the Microsoft support Web site.

Workbook Closes Unexpectedly if Name Contains Square Bracket

If you install the COM add-in and your Microsoft Excel workbook name contains a square bracket, Excel stops responding or closes unexpectedly after opening.

To resolve this problem, rename the workbook so that it does not contain any square brackets.

Reports Unavailable in Cognos Connection Jobs after Using Save As Command in Report Studio

After opening a report in Report Studio and saving a copy using the Save As command, you may find that if the report is included in a job, it is not available in the Cognos Connection portal.

Do not use the Save As command in Report Studio to save changes when a report is included in a job. Instead, make a copy of the report, make changes to the copy, and then copy the updated report to the Cognos Connection portal. Use this method to overwrite the report in the job without breaking the report links.

Processing Issues

The following issues are related to processing and rendering reports.

Cannot Render this Report

The Report Data Service (RDS) cannot bring report elements into a Microsoft Office document. Some combinations of text and images are beyond the scope of the target application.

To resolve this problem, evaluate the report and attempt to simplify the content requirements so that Cognos 8 Go! Office can render the report.

RDS Data Limit Exceeded When Importing from Large Report Outputs

While attempting to import all or part of a large report, the application attempts to open the entire report. A provisional governor limit is in place to restrict the size of report output allowed and might result in an error (even if you are trying to import only part of a report).

To resolve this problem, you can adjust the size limit for report data by changing the Governor limit setting.

Steps

1. Start Cognos Connection.
2. In the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change view** menu. Click **Services**, and then click **Report Data**.
5. Click the arrow next to **ReportDataService** to view the **Action** menu, and then click **Set Properties**.
6. Click the **Settings** tab.
7. In the **Value** column, change the number for **Governor limit (MB)**, and then click **OK**.

RDS Server Unavailable

The Cognos Report Data Service (RDS) manages the transfer of report data between Cognos 8 and applications that consume the data, such as Cognos 8 Go! Office.

To resolve this problem, restart RDS. RDS restarts when the Cognos 8 service is restarted.

Steps to Restart the RDS Server

1. In a browser, connect to Cognos 8 as an administrator.
2. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
3. On the **Status** tab, click **System**.
4. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change View** menu. Click **Services**, and then **Report Data**.
5. With the **Report Data** service displayed, click the arrow to view the **Actions** menu next to the service, and then click **Start**.
6. If RDS fails to start, or if Cognos 8 is not responding, start Cognos Configuration.
7. Choose whether to start or restart Cognos 8.
   - If Cognos 8 is not running, click **Start**.
   - If Cognos 8 is running, click **Restart**.

Imported Reports Are Missing Charts or Images

Cognos 8 Go! Office is functioning normally, but charts and images are missing. The client machine, which is running Cognos 8 Go! Office, cannot connect to the gateway URL as configured in Cognos 8. This may be because it is behind a firewall, the hostname/DNS is not known to this client machine, or the client machine has proxy issues.

To resolve the connectivity issues, work with your system administrator.

#ERROR Appears in Cells With Multiple Images in a Cell (Excel Only)

Multiple images in a cell cannot be rendered.

The solution is to reauthor the report to move each image to its own cell, then reimport the report.

The Dispatcher Is Unable to Process the Request. The Request Is Directed to an Unknown Service Name: *Content*

The Cognos Report Data Service (RDS) cannot bring report elements into a Microsoft Office document. Some combinations of text and images are beyond the scope of the target application.

To resolve this problem, evaluate the report and attempt to simplify the content requirements so that Cognos 8 Go! Office can render the report.

Report Content is Not Imported

If the report name has a single quotation mark and the **Create new worksheets for report pages** option is selected, the report content is not imported.

To resolve this problem, you must rename the report without the single quotation mark.

Incorrect Format for the Prompt Value in Prompted Reports

When you refresh a prompted report using the **Specified Value** type, the prompt value does not display properly in the **UseValue** field.

Not all prompt values are affected. Some of the prompt properties appear as expected while others may look like this:

```
[great_outdoors_company].[Products].[Products].[Product line]->:[PC].[@MEMBER]
.[5~236]
```

In this example, the selected prompt value is "Golf Equipment" which is displayed properly in the **Display Value** prompt property.

In cases where this occurs, you must know that the equivalent format in the **Specified Value** is the value with which you want to refresh the report. In the example, [great_outdoors_company].[Products].[Products].[Product line]->:[PC].[@MEMBER].[5~236] is equivalent to Golf Equipment.

To refresh the report, we recommend that you use the **Always Prompt** option. That way, users can select the value from the report's own prompt dialog box.

Steps to Select the Always Prompt Option

1. To view the report properties, from the **Manage Data** tab, click the report.
2. Expand the prompt properties.
3. In the **Type** box, click **Always Prompt**.
4. Refresh the report.

   The report refreshes with the requested parameters.

   Note: This does not affect the import of prompted reports.

DPR-ERR-2079 Firewall Security Rejection

If you run a report after your session has expired and then try to navigate away from the first page of the report, you encounter the following error message:

```
DPR-ERR-2079 Firewall Security Rejection. Your request
was rejected by the security firewall. CAF rejection details are
available in the log. Please contact your administrator.
```

To resolve this problem, after an expired session, you must log on again.

Steps to Log On

1. In the report list, right-click the top node item.
2. Click **Log On**.

3. Provide your authentication credentials as prompted and click **OK**.

This item cannot be expanded. Microsoft Excel has reached the maximum number of rows or columns for this worksheet

The number of rows and columns is limited in Microsoft Excel. Expanding the current item is not possible because it would shift rows or columns beyond this worksheet limit. Microsoft Office Excel cannot shift nonblank cells off the worksheet.

Manually move items so that the row or column item can expand without reaching the limit, or move your exploration or analysis to another worksheet. Or, you can move the data to a new location and try again.

Security Issues

The following issues are related to security setup.

Cognos 8 for Microsoft Office Unable to Create Trust Relationship

If you are using HTTPS to RDS and you receive an error in Cognos 8 for Microsoft Office about being unable to trust the relationship, the Certificate Authority (CA) certificate that was issued by the Web server is not trusted on the client workstation.

To resolve this problem, you must ensure that the Certificate Authority (CA) that issued the Web server certificate is also trusted on the client workstation. If the certificate is not from an authority that is already trusted on the client, such as Verisign, you must install the CA certificate in the trust store on the client.

Steps to Ensure that the CA Certificate is Trusted on the Client Workstation

1. Retrieve the CA certificate from the issuing authority.

   The file has a .cer extension. This is not the same certificate as the one used by the Web server. It is the certificate for the issuing authority itself.

2. Double-click the .cer file, click **Install Certificate**, and then click **Next**.
3. Click **Place all certificates in the following store**.
4. Click **Browse**, click **Trusted Root Certification Authorities**, and then click **Next**.
5. Click **Finish**.

Unable to View Reports After Clicking View Report

Cognos 8 Go! Office is functioning normally, but you cannot use the **View Report** option to view reports. The client machine, running Cognos 8 Go! Office, cannot connect to the gateway URL as configured in Cognos 8. It is behind a firewall, the hostname/DNS is not known to this client machine, or the client machine has proxy issues.

To resolve the connectivity issues, work with your system administrator.

Cognos 8 for Microsoft Office Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the Cognos 8 for Microsoft Office log.

COI-ERR-2005 This Version of Microsoft Office Is Not Supported

Cognos 8 for Microsoft Office supports the following Microsoft Office applications: Microsoft Office Excel 2003 or 2007 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 or 2007 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003 to 2007, and Microsoft Office PowerPoint XP. You cannot load Cognos Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

COI-ERR-2006 This Microsoft Office Product Is Not Supported

Cognos 8 for Microsoft Office supports the following Microsoft Office applications: Microsoft Office Excel 2003 or 2007 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 or 2007 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003 to 2007, and Microsoft Office PowerPoint XP. You cannot load Cognos Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

COI-ERR-2008 Unable to Retrieve from Resources. Tried '{0}'

An internal processing error occurred.

Contact customer support. Be ready to supply all relevant logs and details related to this error.

COI-ERR-2009 Unable to Perform This Operation Because Microsoft Excel is in Edit Mode

Report content cannot be refreshed while one of the cells of the workbook is being edited.

Click outside the active cell to return it to a non-edit mode and try again.

COI-ERR-2010 The Name {0} is Not Valid. A Name Must Not Contain Both a Quote (") Character and an apostrophe (') character

When you create a folder, rename a folder, or publish a document, the name can contain an apostrophe or a quote, but not both.

To resolve this problem, rename the folder or document. Exclude the apostrophe or quote character from the name.

COI-ERR-2011 The server did not return the expected response. Check that the gateway is valid.

This error message is displayed if the value entered in the **System Gateway URI** box of the **Options** dialog box is not a valid Cognos 8 server.

To resolve this problem, reenter the **System Gateway URI** with the gateway address for a valid Cognos 8 server.

Report Data Service (RDS) Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the Cognos server log, which is located at <*Cognos 8_installation_location*>/logs/cogserver.log.

RDS-ERR-1000 Report Data Service Could Not Process the Response from the Content Provider

The cause for this error varies based on the application server.

- In WebSphere, this error occurs if another XML parser, such as Xalan is colliding with the one RDS uses.
- In BEA WebLogic, this error occurs if the JAVA_OPTIONS variable has not been set with the correct parser information.
- This error can also occur if a package from a previous version of Cognos 8 (or ReportNet®) was deployed to Cognos 8 without the report specifications being upgraded.
- Another possible reason for this error message is that RDS cannot handle the report. For example, this error occurs if a Report Studio report contains a block with either of the following:
  - a repeater or repeater table inside a block or a table
  - a layout object, such as a list, crosstab, chart, or text object in a conditional block inside another block or a table

Set the Class Loader Policy in WebSphere

For WebSphere, the best solution is to set the Class loader policy to **PARENT_LAST**. The WebSphere documentation tells the administrator how to do this.

Set the JAVA_OPTIONS Variable in WebLogic

If you are accessing Cognos 8 Go! Office through Cognos 8 on a BEA WebLogic Application Server add the following to the JAVA_OPTIONS variable of the startManagedWebLogic.cmd (Windows) or startManagedWebLogic.sh (UNIX) script file:

-Dorg.xml.sax.driver=org.apache.xerces.parsers.SAXParser

Upgrade Report Specifications

Follow the steps for "Upgrading Report Specifications" in the Cognos 8 *Administration and Security Guide*.

Edit the Report

To avoid problems with report layout, you must modify the report by performing one of the following:

- Take the repeater or repeater table out of the block or table.
- Cut the layout object from the conditional block into a new conditional block, block, or table.

RDS-ERR-1001 The PowerPlay Report *Name* Could Not Be Run. The Expected Response Was Not Returned by PowerPlay

PowerPlay failed while running the report or RDS cannot understand the output.

To resolve this problem, ensure that PowerPlay is functioning properly. The user should check to see that the PowerPlay server is running, or check the PowerPlay logs for errors. If IIS is being used for the Web server, ensure that Anonymous Access is enabled. For more information, see the Cognos 8 *Installation and Configuration Guide*.

RDS-ERR-1004 A Connection Could Not Be Established with Cognos 8

Cognos 8 is not responding.

Check the Cognos 8 logs. Ensure that Cognos 8 is functioning properly.

RDS-ERR-1005 The Logon Requirements for Cognos 8 Could Not Be Obtained. You May Already Be Logged into this Namespace, or the Target Namespace Does Not Exist

Generally, this error occurs when trying to log on to the same namespace twice. In some cases, it may indicate a problem with a security setup such as SiteMinder.

Ensure that you are not already logged in.

RDS-ERR-1012 Cognos Content Service was Unable to Discover the Content Providers

This error usually appears in conjunction with RDS-ERR-1028 and means that RDS could not communicate with any PowerPlay providers. (RDS-ERR-1028 can occur separately if there is more than one PowerPlay server, and only one has failed).

Check that all instances of PowerPlay Enterprise Server are running properly.

RDS-ERR-1013 Report Data Service Was Unable to Query Content Manager

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1014 Report Data Service Was Unable to Create the Document Object *Object Name*

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1015 Report Data Service Was Unable to Create a New Document Version

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1016 Report Data Service Was Unable to Create a New Document Content Object

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1018 The Cognos 8 Report *Name* Could Not Be Run. The Expected Response Was Not Returned by Cognos 8

An error was returned by Cognos 8 when the report was run. PowerPoint does not contain the necessary facilities to recreate the rich formatting and layout of this report.

Check the Cognos 8 error log for troubleshooting information. If the report in question was not able to be rendered, adjust the report to remove the formatting and layout to expose the data in PowerPoint, where formatting and layout can be modified.

RDS-ERR-1019 Cognos Content Service Was Unable to Retrieve the Portal Information from Cognos Connection

Cognos 8 may have stopped processing.

Ensure that Cognos 8 is started.

RDS-ERR-1020 The Currently Provided Credentials are Invalid. Please Provide the Logon Credentials

Your user name and password are not correct.

Ensure that you entered a valid user name and password.

RDS-ERR-1021 The Cognos 8 Report *Name* Could Not be Run Because it Contains Unanswered Prompts. Please Provide the Prompt Answers, and Run the Report Again

The report has prompts that have not been set.

You must open the report and then save a version of the report with the desired prompt answers before importing the content into Cognos 8 Go! Office.

RDS-ERR-1022 The Request Received by Report Data Service Is Not Valid

This error message could indicate that someone is trying to externally access RDS.

Stop and restart RDS.

RDS-ERR-1023 The Report *Name* Could Not Be Run Because It Exceeds the Report Data Service Data Size Limit Set by the Administrator

A report fails because it exceeds the data size limit set by the administrator. The default limit for Cognos 8 Go! Office is 10 MB.

Increase the size limit for report data by changing the Governor limit setting. For more information, see the Cognos 8 *Administration and Security Guide*.

RDS-ERR-1027 The Encoding for the PowerPlay Server *Name* Could Not Be Determined. ISO-8859-1 Will Be Used as the Encoding

This condition can be caused if PowerPlay is not responding.

Ensure that PowerPlay is started and functioning properly.

RDS-ERR-1030 A Security Error Occurred While Trying to Establish a Connection with *Name*

The CA certificate was not installed into RDS.

Install the CA certificate.

RDS-ERR-1031 Report Data Service was unable to retrieve the metadata for *Name*

The provider, such as Cognos 8 or PowerPlay is not responding.

Ensure that Cognos 8 or PowerPlay is running. Check the server log for error messages related to these providers.

RDS-ERR-1033 Report Data Service Was Unable to Create the Report View *Name*

Content Manager is not responding.

Ensure that Content Manager is running. Check the server log for error messages related to Content Manager.

RDS-ERR-1034 The Report Specification for *Name* Could Not Be Retrieved From Cognos 8

This message occurs if the metadata could not be retrieved from Cognos 8.

Ensure that Cognos 8 is running. Check the server log for error messages related to Cognos 8.

RDS-ERR-1039 The Request Could Not Be Cancelled. The Request is No Longer Running

This error occurs if a user (or administrator) tries to cancel an RDS request, but the request no longer exists. This can happen if the user clicks **Cancel** after the administrator has already restarted RDS.

Wait for RDS to restart.

RDS-ERR-1040 The Conversation With *Conversation ID* Has Been Cancelled

This message appears in the audit log if a request is cancelled by either the user or by the administrator. Users can cancel their own requests. Administrators cannot cancel specific requests, but can cancel all requests by stopping and restarting the service.

Stop the service and abandon all running requests.

Steps

1. In Cognos Connection, in the upper-right corner, click **Launch**, **Cognos Administration**.
2. On the **Status** tab, click **System**.
3. In the upper-left corner of the **Scorecard** pane, click the arrow to view the **Change View** menu. Click **Services**, and then **Report Data**.
4. With the Report data service displayed, click the arrow to view the **Actions** menu next to the service, and then click **Stop immediately**.

By using this method, RDS supports canceling long running requests, such as running a report.

RDS-ERR-1044 The Output for the Requested Version for Object *Name*Could Not be Retrieved

The report output version that you want to run cannot be retrieved from the content store.

This problem can be caused by one or more of the following:

- the requested report version name, specified burst key, or burst ID, does not exist
- the requested version does not have any outputs that meet any of the accepted formats, such as XML, PDF, or HTML

  The report author did not specify a default format to be used when the report is run.
- you do not have sufficient access permissions to retrieve this output

  To run the report, you must have execute permission for the report and traverse permissions for the folder that contains the report.

RDS-ERR-1045 LayoutDataXML Output Was Not Generated For the Requested Version for Object [*Name*]

The report version you want to run exists in the content store, but was not saved with the LayoutDataXML output.

When the report output version was saved, the report author must have selected the **Enable enhanced user features in saved output version** check box in Cognos Connection.

For more information, see the Cognos 8 Cognos Connection *User Guide*.

Cognos 8 Go! Office Numbered Error Messages

The following error messages may appear in a dialog box and are recorded in the Cognos 8 Go! Office log.

COC-ERR-1003 Failed to Create Slide

You cannot add a new slide in the wizard.

Microsoft Office PowerPoint is in a state that it cannot add a slide. Exit the wizard and attempt to create a slide manually in Microsoft Office PowerPoint.

COC-ERR-1302 There Is No Data Source Available

Cognos 8 Go! Office cannot connect to the Report Data Service (RDS).

Check for connectivity issues.

COC-ERR-2005 The Import Failed

An unknown issue caused the import of report content to fail.

Other possibilities may include:

- the logon requirements for Cognos 8 are not available. You may already be logged onto this namespace, or the target namespace does not exist.
- protection for the Excel workbook structure exists

  The protection prevents users from adding or deleting worksheets or from displaying hidden worksheets.

Check that your report uses standard practices. Revise and resave the report, ensuring that text and images are not located in the same cell.

If the workbook structure is protected, ensure that the **Structure** check box in the **Protect Workbook** dialog box is cleared. In Excel, from the **Tools** menu, click **Protection**, and then click **Protect Workbook**. In the **Protect Workbook** dialog box, clear the **Structure** check box, and then click **OK**.

COC-ERR-2006 Failed to Load the Portal Tree: *Name*

This error occurs while attempting to log onto the Cognos 8 Server from a Cognos 8 Go! Office session. You must install .NET Framework v2.0.

This can be a connectivity issue. It may also mean that the Cognos 8 service has stopped.

As documented in the Cognos 8 *Installation and Configuration Guide*, to deploy Cognos 8 Go! Office, you must first install Microsoft .NET Framework version 2.0 on the client workstation.

If you have already installed the required Microsoft .NET framework, check for LAN connectivity issues. Restart the Cognos 8 service.

COC-ERR-2012 Failed to Render the List

A cell style or cell format in the Microsoft Office Excel workbook is not compatible with the data that you are attempting to import, or you are attempting to import content to a locked range.

Ensure that the range is valid and not locked, and that the style of the cell in the Microsoft Office Excel workbook is compatible with the style in Cognos 8.

COC-ERR-2013 This Is an Unsupported Office Application

Cognos 8 Go! Office supports the following Microsoft Office applications: Microsoft Office Excel 2003 (Professional or Standard), Microsoft Office Excel XP, Microsoft Office Word 2003 (Professional or Standard), Microsoft Office Word XP, Microsoft Office PowerPoint 2003, and Microsoft Office PowerPoint XP. You cannot load Cognos 8 Go! Office content to another Microsoft Office application, such as Microsoft Access even when there is an add-in that enables these applications to interoperate.

Load the report content into one of the supported applications and environments.

COC-ERR-2014 Refresh Failed

Cognos 8 Go! Office cannot refresh report content. Another error message should indicate why. If there is no other error message, the problem is outside Cognos 8 Go! Office. This may indicate a system problem, a server malfunction, or no LAN connectivity.

Attempt to refresh the content again. Check system and server functions.

COC-ERR-2015 Failed to Open the Import Wizard Dialog

When the Cognos 8 Go! Office Import Content wizard loads, it pages through the report and populates the tree and creates a page for each report element. If an unexpected error occurs in the report, this error is logged.

Try importing the report again. If it fails, open the report in the studio in which is was created and save the report. Check the log file for more detailed information.

COC-ERR-2019 Failed to Refresh an Image

The image could not be rendered because the Microsoft Windows Clipboard is locked.

Wait until the clipboard operation finishes. You may need to finish clipboard activity in another application before trying to refresh the content.

COC-ERR-2301 Logon Failed

Your user name and password are not correct.

Ensure that you entered a valid user name and password.

COC-ERR-2303 This Report Is Not Valid for Rendering

Cognos 8 Go! Office cannot render a top report, where a report is nested within another report.

Take the report out of its nested report and resubmit the request.

1. Redesign the report.
2. Resave the report.
3. Import the resaved report into Cognos 8 Go! Office.

COC-ERR-2304 This Is a Prompted Report. It Is Not Currently Supported

Depending on the version of Cognos 8 Go! Office and the type of report, some prompting may not be supported.

Modify the report so that prompting can take place at the same time using a prompt sheet, or try to establish defaults for the prompts based on user privileges. You can also save the report with prompt values.

Steps to Save the Report with Prompt Values

1. Using Cognos 8 or PowerPlay Web, run the report.
2. Save the report view.
3. In Cognos Connection, click **Properties** for the report view that you saved.
4. Click the **Run Options** tab.
5. Under **Prompt Values**, click **Set the prompt values**.
6. Provide the prompt answers.
7. Click **OK**.

COC-ERR-2305 Microsoft Excel Returned an Error. Ensure That Microsoft Excel is Not in Edit Mode, Then Try Again

Report content cannot be refreshed while one of the cells of the workbook is being edited.

Click outside the active cell to return it to a non-edit mode and try again.

COC-ERR-2308 Report Specification is Empty

The report you attempted to import into Cognos 8 Go! Office has no content. To import a report, it must have content.

Choose another report to import, or finish authoring the report before attempting to import it.

COC-ERR-2603 You Must Add a Slide to the Presentation Before Importing Any Content

The presentation has no slides. Cognos 8 Go! Office requires at least one slide in the presentation for the Import Content wizard to start.

Add a slide to the presentation and then try to import report content again.

COC-ERR-2604 Cannot Render Empty List Object

The list object you selected for import was empty. Cognos 8 Go! Office cannot import an empty list object.

Open the report and populate the list object with data before attempting to import the content into Cognos 8 Go! Office.

COC-ERR-2607 *Microsoft Office Message*

During initialization, you receive an error, COC-ERR-2607, and, in some instances, a Microsoft Office message, such as:

`File or assembly name Microsoft.Office.Interop.`*`ApplicationName`*`, or one of its dependencies, was not found.`

This error indicates that a required application or the .NET support for one of the required Microsoft Office applications is not installed.

Microsoft Office Excel, PowerPoint, and Word, and Microsoft .NET Programmability support for all three of these applications is required for Cognos 8 Go! Office to work properly.

Ensure that you have installed all three Microsoft Office applications and that the Microsoft .NET support is enabled. For more information, see the Cognos 8 *Installation and Configuration Guide*.

COC-ERR-2609 The Custom property "*Property_Name*" does not exist

You have imported a prompted report and have specified a name for **Custom Property** in the **Properties** pane that does not match the custom document property name in the Microsoft Office **Properties** dialog box.

In Cognos 8 Go! Office, in the **Properties** pane, for each prompt, ensure that the value specified in the **Custom Property** box, matches the value specified in the custom document property in the Microsoft Office **Properties** dialog box (**File**, **Properties**, **Custom** tab). Ensure that there are no leading and trailing character spaces in the name of the custom document property.

For more information, see the Cognos 8 Go! Office *User Guide*.

Glossary

action

A task that affects the performance of an individual metric. Metric Studio tracks the dates, resources and status of actions and their relationship to a metric.

agent

The object type created and edited by Event Studio. An agent contains the event condition and the associated tasks to perform. Once defined, an agent can be scheduled to check for instances of the event.

alias

In modeling and database terminology, a secondary name for a database table. Aliases are used to create a distinct reference to the table in the model, so that self-joins can be created or ambiguous query paths can be resolved.

In map information technology, a secondary name for a map feature. Aliases are used to create a reference between custom map feature names and feature names in databases.

attribute

In relational models, a query item that is not a measure or identifier. When a query item is an attribute, it is not intended to be aggregated, or used for grouping or generating prompt pick lists.

In dimensional models, attributes provide qualitative information about members of a level in a dimension. For example, the Store level within the Retailer dimension might have properties such as "address" or "retail space." In general, dimensional attributes do not have measure values or rollups associated with them, but are used to locate or filter members.

authentication

The process of verifying the identity of users when they log on. Users must be authenticated before they can be authorized to use any secured resources.

certificate

A document that identifies someone or something by name. Certificates are issued by certification authorities. Each Cognos computer in a distributed installation uses a different certificate. Certificates are used to positively identify an entity. They are used for digital signatures and secure communications, and can be used for encryption or decryption.

common gateway interface

(CGI) A standard that describes how Web servers should access other programs to create a document that will appear in a Web browser. For example, Web servers often use CGI programs to process forms.

condition

An expression that yields a boolean value. Conditions are used in query expressions, query filters, and boolean report variables that can be used for conditional formatting, styles, data sources, layouts and blocks.

connection

The named information that defines the type of the data source, its physical location, and any signon requirements. A data source can have more than one connection.

content locale

A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, money expressions, and time of day.

For Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).

credentials

Information stored about the identity of a Cognos user, usually a user name and password. You can assign your credentials to someone else so that they can use resources that you are authorized to use.

Credentials are created for Cognos components. If a user schedules or programs an action, credentials must be stored in the content store.

cube

A physical data source containing a multidimensional representation of data. A cube contains information organized into dimensions and optimized to provide faster retrieval and navigation in reports. In Cognos Planning, a cube (see also D-Cube) corresponds to a tab on Contributor client user interface.

data source

A relational database, dimensional cube, file, or other physical data store that can be accessed though Cognos 8.

data tree

Within a studio, contains objects such as query subjects, query items, dimensions, levels, and members. A data tree is used as a palette of the available data that can be inserted into calculations, filters, display areas, and other authoring gestures.

dimension

In Cognos Planning, the rows, columns, and pages of a cube are created from dimensions. Dimensions are lists of related items such as Profit and Loss items, months, products, customers, and cost centers. Dimensions also contain all the calculations. One dimension can be used by many cubes.

In Cognos 8 BI a dimension is a broad grouping of descriptive data about a major aspect of a business, such as products, dates, or markets. Each dimension includes different levels of members in one or more hierarchies and an optional set of calculated members.

event

An exceptional item of data, defined by specifying a query expression against items in a package. When data is detected matching the event condition, it causes an agent to perform tasks.

gateway

An extension of a Web server program that transfers information from the Web server to another server. Gateways are often CGI programs, but may follow other standards such as ISAPI and Apache Modules.

hierarchy

A hierarchy represents a collection of dimensional members organized into a tree structure, with each member having one or more parent members and an arbitrary number of child members.

The root of a hierarchy has no parent, and leaf members of a hierarchy have no children.

HTTPS

A secure version of HTTP Hypertext Transfer Protocol that incorporates secure sockets layer (SSL)
.

Cognos products use HTTPS and SSL to encrypt and transmit passwords securely over the Internet.

information pane

In Analysis Studio, a pane that helps you to confirm your selection in the data tree by displaying related information such as the level and attributes.

job

A group of runnable objects, such as reports, agents, and other jobs that you run and schedule as a batch.

locale

A code that is used to set the language or dialect used for browsers, report text, and so on; and the regional preferences, such as formats for time, date, money, and money expressions.

For Cognos products, you can specify a locale for the product interface (product locale) and for the data in the report (content locale).

namespace

For authentication and access control, a configured instance of an authentication provider. Allows access to user and group information.

In XML, a collection of names, identified by a URI reference, which are used in XML documents as element types and attribute names.

In Framework Manager, namespaces uniquely identify query items, query subjects, and so on. You import different databases into separate namespaces to avoid duplicate names.

prompt

A report element that asks for parameter values before the report is run.

report

A set of data deliberately laid out to communicate business information. Depending on the context, "report" may refer to report specification or report output.

Report (more precisely, report specification) is the generic term for the objects created or edited by Query Studio, Report Studio, and Analysis Studio.

report specification

The definition of queries, prompts, layouts, and styles that make up a report. A report specification is combined with data by a run operation to create report outputs. You create report specifications by using Report Studio, Query Studio, Analysis Studio, or through the Software Development Kit.

report view

A reference to another report that has its own properties, such as prompt values, schedules, and results.

You use report views to share a report specification instead of making copies of it.

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